North Carolina Immunization Registry (NCIR)

Manage Inventory

User Guide

Last Updated: October 28, 2021



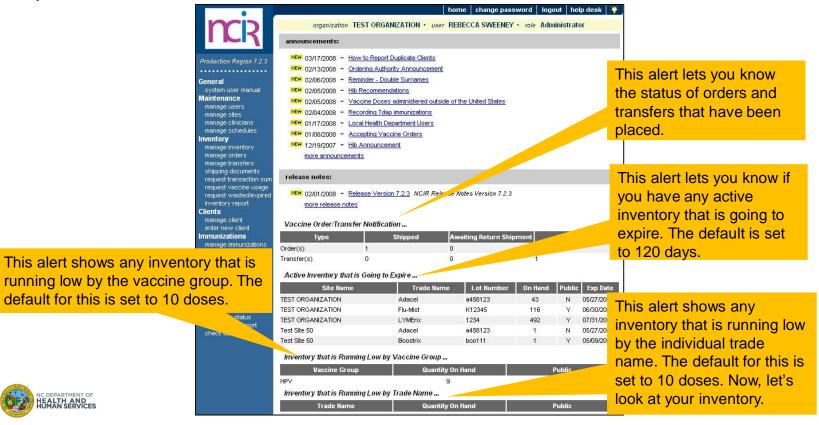


# Manage Inventory



#### Step 1 of 3: Navigate homepage

There are several inventory alerts that appear on the home page for the Administrator and Inventory Control Users. We are going to look at these alerts and then move on to how to manage your inventory. Keep in mind that any of these alerts can be changed to suit the individual practice by the administrator.

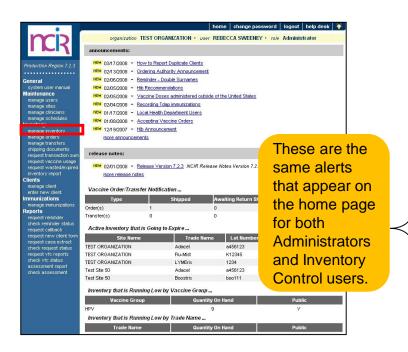


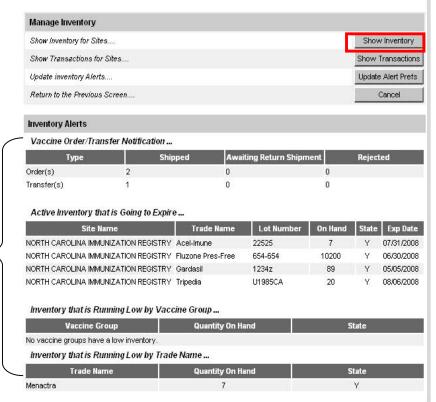
#### **Audience**

Inventory Control

#### Step 2 of 3: Navigate to Inventory

- 1. On the homepage, click Manage Inventory
- 2. On the Manage Inventory page, click **Show Inventory**







**Audience** 

Inventory Control

#### Step 3 of 3: Manage Inventory

From this screen you can add inventory, modify quantity, and show transactions for your inventory

Manage Inventory Add Inventory for Site (TEST ORGANIZATION).... Add Inventory Modify Quantity On Hand for Selected Sites .... Modify Quantity Show Transactions for Sites .... Show Transactions Return to the Previous Screen... Cancel Show Active Olnactive Olnon-Expired Olexpired Site: TEST ORGANIZATION V O Public O Private O All Select Public Exp Da Trade Name **Lot Number** Inv On Hand Υ ActHib U1234AA 710 Υ 05/05/2009 a456123 43 05/27/2008 Adacel Υ 01/01/2009 Adacel ABC123 14 Boostrix 12351 4 Y 10/12/2010 Certiva 555 279 01/31/2009 DECAVAC 05269 10 Y 08/28/2008 DECAVAC **AB44** Υ 20 01/01/2009 Υ DT 121252555 18 05/20/2009 DTP 098898 19 10/20/2009 Engerix-B Peds 1235N 8 Y 12/31/2009 Flu-Mist K12345 116 06/30/2008

You can look at any combination of inventory in the NCIR by clicking on the radio button next to your selection. For example, if you want to see all your active, public vaccine click on the radio button next to **Active** and **State**.

#### **Audience**

Inventory Control

Administrator

less than 120 days will be highlighted in pink.

Vaccine's that

will expire in

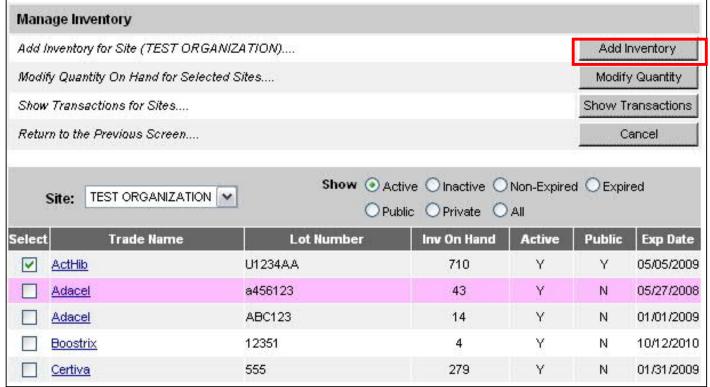


# Steps for Adding Private Inventory (Non-COVID-19 Vaccine)



# Step 1 of 3: Navigate to Inventory

- 1. On the homepage, click Manage Inventory
- 2. Click **Show Inventory**
- 3. Click Add Inventory

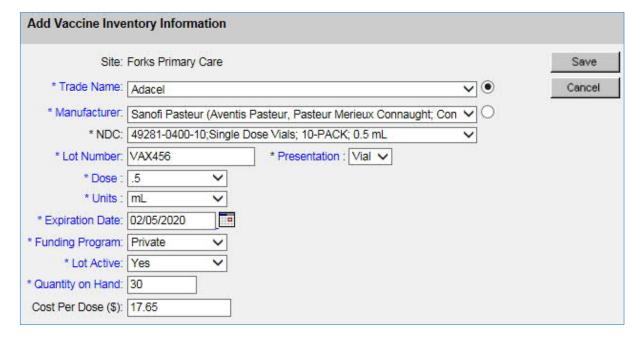






# Step 2 of 3: Complete Inventory Information

- 1. Choose the **Trade Name**, the Manufacturer will automatically populate
- 2. Enter the **NDC** (noted on the outside of the vaccine box)
- 3. Enter the **Lot Number** (use the number on the vaccine box, NOT the vial)
- 4. Verify the **Dose** size from the drop-down menu
- 5. Verify the **Units** (will always be mL unless you are administering a vaccine in capsule form) NOTE: Tubes are not considered capsules.

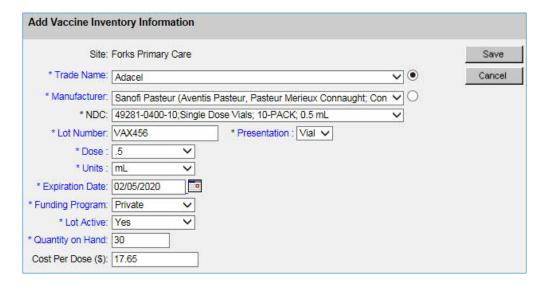






#### Step 2 of 3: Complete Inventory Information

- 6. Enter the **Expiration Date**. **NOTE**: Vaccines with only a month and year should be entered as the last day of the month of expiration.
- 7. Verify the **Funding Program** (should always be **Private**)
- 8. Lot Active drop-down must be set to **Yes** to be saved. (**Yes** will make the Lot number appear in the drop-down menu under the Lot Number/Trade Name when documenting administration of a dose of vaccine. If you do not want the lot number to appear in the drop-down menu, change the active indicator to **No** after saving the initial information)
- 9. Enter the **Quantity on Hand** (the number of doses, not boxes or vials)
- 10. Cost Per Dose is optional

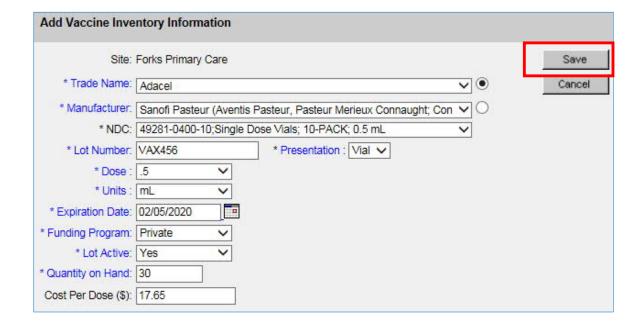






# Step 3 of 3: Save

#### Once complete, click Save





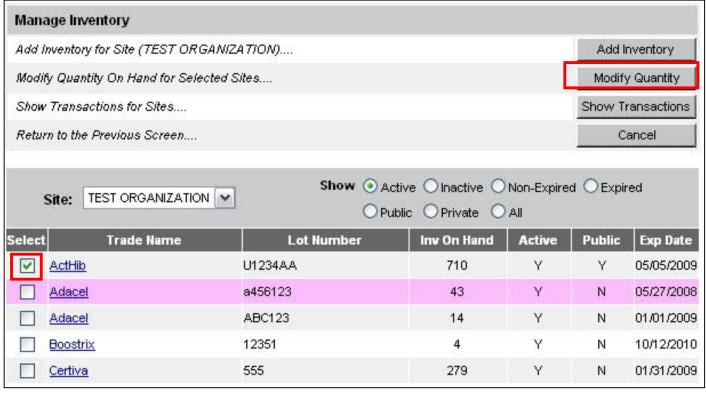


# Steps for Modifying Quantity



# Step 1 of 2: Modify Quantity (Option 1)

- 1. Click in the box next to the **Trade Name** in blue until the green check appears.
- 2. Click Modify Quantity

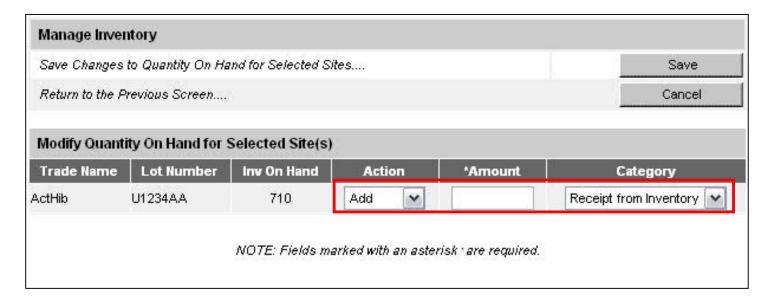






## Step 2 of 2: Modify Quantity (Option 1)

- 1. Choose the Action from the drop down box. Either Add or Subtract.
- 2. Enter the **Amount** in doses that is being modified.
- 3. Choose the reason under the **Category** drop down box. See the next slide for an explanation of each transaction.



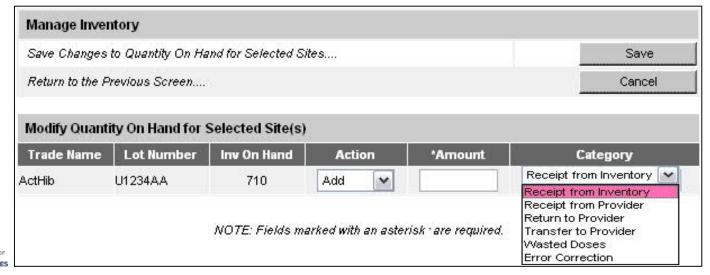
This screen will allow you to modify the quantity of as many vaccines as you choose on the previous screen. It is good to use this option if you have several lot numbers to edit.



# Audience Inventory Control

## Reasons to Modify Quantity (1 of 2)

- 1. Receipt from Inventory: Select this option to add private inventory received from manufacturer with the same trade name, lot number, funding source and expiration date.
- 2. Receipt from Provider: Select this option to add inventory received from a provider with the same trade name, lot number, funding source and expiration date. This is intended for doses returned from providers not in NCIR. For providers in NCIR, use the manage transfer screen to track inventory shipments.
- 3. Return to Provider: Select this option to add doses are being returned to you from another organization or an external site after your inventory transfer was returned. This is intended for doses returned from providers not in NCIR. For providers in NCIR, use the manage transfer screen to track inventory shipments.

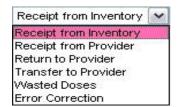






## Reasons to Modify Quantity (2 of 2)

- **4. Transfer to Provider**: Select this option if you are transferring doses out of your inventory to an external site.
- **5. Wasted Doses**: Select this option if there was any vaccine waste for a particular lot. When you select the Wasted Doses category, you will be required to enter the following:
  - 'Reason': Reason that the doses are marked as wasted
    - Example: Tray left out overnight. (verified non viable with Immunization Branch
  - 'Preventive Action': Action taken to prevent further wastage
    - Example: Return vaccine tray to refrigerator immediately after drawing vaccine
- **6. Error Correction**: Select this option if you have made any errors in entry to your private stock of vaccine. For example you entered 100 instead of 10 for the quantity. You will also be required to enter a reason for error correcting. \*\*Before you error correct any state supplied vaccines, you should call the NC Help Desk, 1-877-873-6247, so that you may be guided in how to find errors before changing quantities in vaccine lots.





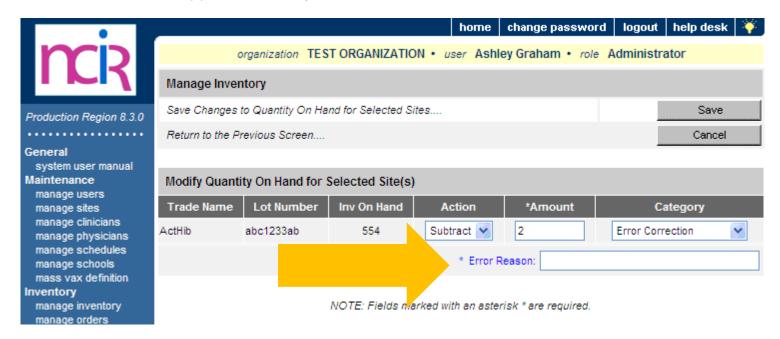
Administrator

Control



### Fixing Errors

- You can modify your private inventory discrepancies on your own.
- Issues with state supplied inventory need to be Error Corrected.



When a State-Supplied lot quantity is modified using the Category "Error Correction," an **Error Reason** must be entered.



# Audience

Inventory Control

#### **Error Correction**

#### When to Use Error Correction

- Use this category when adding to or subtracting from inventory doses that were keyed or documented incorrectly
  - i.e. if 100 is entered instead of 10

#### When NOT to Use Error Correction

- If inventory is expired
- If a storage and handling issue caused
- the dose to be unusable
- If the vaccine is pre-drawn and not used

#### Audience

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#### **Avoid Documentation Errors**

- Enter all immunizations administered into the NCIR as soon as possible
- Only enter immunizations administered by you, under your username
- Document all doses that have been administered, transferred, wasted and/or expired in the NCIR

#### **In Summary**

- Error Correction should be used infrequently
- Use best practices to maintain vaccine inventory correctly in the NCIR
- If you are unable to reconcile your inventory error correction should be your last option

#### **Audience**

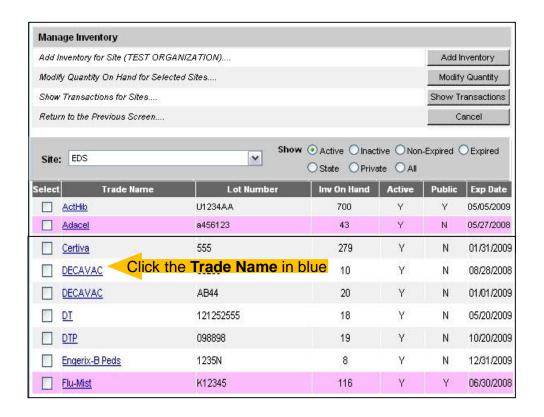
Inventory Control



# Step 1 of 3: Modify Quantity (Option 2)

The other way that you can modify a quantity of a vaccine in your inventory is to go through the Trade Name link.

1. Start by finding the Trade Name for the vaccine you want to edit.

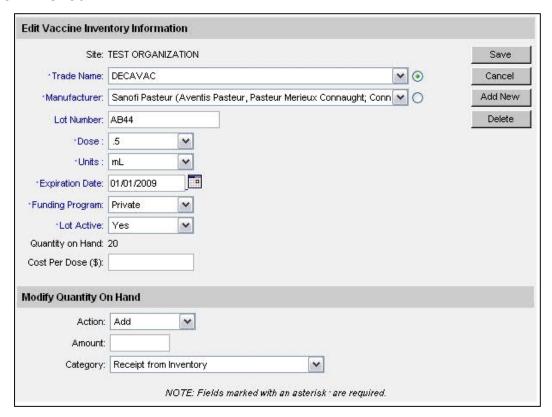






# Step 2 of 3: Modify Quantity (Option 2)

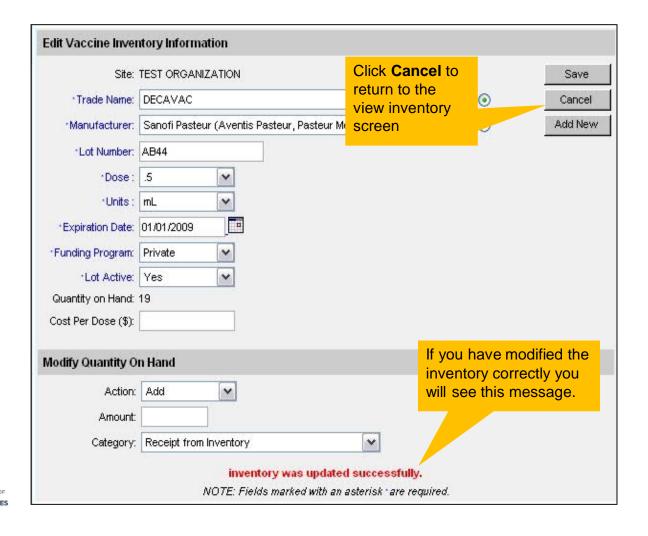
- Choose Add or Subtract from Inventory.
- Enter the Amount in doses.
- 3. Choose the reason from the Category drop down box.
- 4. Click Save when finished.







# Step 3 of 3: View Confirmation or Cancel (Option 2)





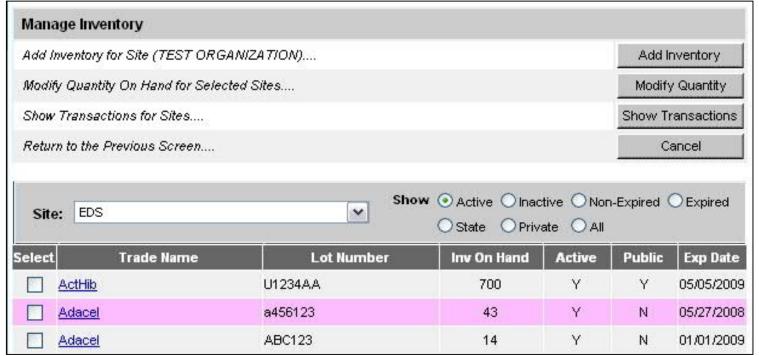


# Steps to Run a Transaction Report



# Step 1 of 2: Navigate to Transactions

- 1. From the home page, click Manage Inventory.
- 2. Click **Show Inventory**.
- 3. Click Show Transactions.







# Step 2 of 2: Select Specifications for Transaction Report

- 1. Enter the **To** and **From dates** for the transaction needed.
- 2. You can also choose the **To** and **From dates** for the date that an actual shot was given.
- 3. You can choose one user name or all user names
- 4. You can choose the **Transaction Type** or look at them all
- 5. If your organization has more than one **site** established you can look at the transactions for one site or for them all.
- 6. You can choose the **Trade Name** or look at them all.
- 7. You can choose **how many records** you want to see.

organization TEST ORGAI	IZATION • user REBECCA SWEENEY • rol	e Administrator
Vaccine Transactions for: TEST OF	GANIZATION	
·Date Entered [From]:	03/01/2008 To: 04/01/2008	View
Date shot was given [From]:		Cancel
User Name:	All User Names	<u>~</u>
Transaction Type:	All Transaction Types	~
Site Name:	All Sites with Inventory	~
Trade Name/Lot Number:	All Lot Numbers	~
Display Last	200 Records	
NOTE: Fields ma	rked with an asterisk - are required.	





#### **Transaction Report**



#### **Audience**

Inventory Control



# **Transaction Codes**

Code	Meaning
REC	Receipt from Inventory
RECS	Receipt from State
RECT	Receipt from Provider
Immunize	Immunizations Given
Delete	Immunizations Deleted
TRA	Transfer to Provider
TRAX	Transfer to State: Expired
TRAV	Transfer to State: Viable
WAS	Wasted Doses
RET	Return to Provider
RETV	Return to State: Viable
RETX	Return to State: Expired
ERR	Error Correction
EXPR	Remove- Expired Private
EXPU	Remove- Expired State



Inventory Control



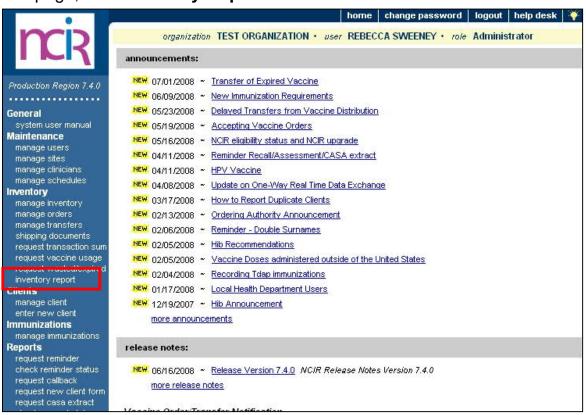
# Steps to Run an Inventory Reconciliation Report



#### Step 1 of 3: Navigate to Inventory Report

An inventory reconciliation report will show you what the NCIR says you have in your inventory and give you room to write your actual count from your refrigerator so that you can begin to balance your inventory.

1. From the homepage, click Inventory Report.

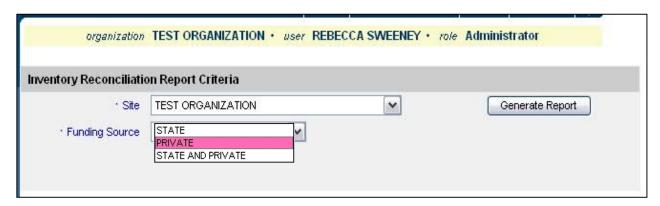






#### Step 2 of 3: Select Criteria

- 1. Choose your Site.
- 2. Choose your Funding Source.
- 3. Click Generate Report when finished.



- Once you click on Inventory Report, you have the choice of what you want to appear in the report itself.
- Make sure that if your organization has multiple sites that you have the correct site selected or you can run the report for all the sites in a single organization.
- You can run the report for all private, all state supplied or both.
- These options give you a wider variety of ways to keep your inventory balanced.





# Step 3 of 3: Generate Report

Report Date	e: 07/01/2008	Inventory Reconciliation	on Report / Worksheet			Page 1 of 2
Funding Source	Vaccine Group	Trade Name	Lot Number	Expiration Date	NCIR Report Doses On Hand	ed Actual Count of Doses On Hand
Private	Anthrax	Anthrax	FDD70019 Private	01/01/2010	98	
Private	DTP/aP	Certiva	555	01/31/2009	274	
Private	DTP/aP	DT	121252555	05/20/2009	18	
Private	DTP/aP	DTP	098898	10/20/200	19	
Private	DTP/aP	Pediarix	ABC234	Dayout	Actu	al Count of
Private	DTP/aP	Pediarix		R Reported es On Hand	Doses on Hand	
Private	HepA	Havrix-Adult		shows the doses that the NCIR reports that you have in your inventory		•
State	НерВ	Recombivax-Adult	KLU2			•
State	Hib	ActHib	1 1112247			•
State	Hib	PedvaxHIB	0259L inver			write the actual
State	Influenza	Flu-Mist	FLU234	01/01/2009		unt here in column

Once you have counted the actual vaccine in your fridge and you compare it to what the NCIR says you have on hand, both columns should match. If they do not you need to run down the list of possible inventory discrepancies. (see next slide)



#### **Audience**

Inventory Control

## Possible NCIR Inventory Discrepancies

#### **Initial Inventory:**

- Initially mis-keying inventory into the NCIR
- Giving immunizations after physical count is completed and before going live with the NCIR

#### **Keying Errors:**

- Doses keyed as historical (which does not subtract from your inventory) instead of doses keyed as new immunization given (which does subtract from your inventory)
- Trouble with data entry of combination drugs (i.e. Pediarix)
- Certain nurses not entering all the shots that were administered
- Clicking the back button when administering shots (which creates a double entry of those shots)
- Picking the wrong site from the site drop down box or not changing the site when entering shots from inventory
- Mixing up State and Private vaccine doses
- Clicking the "Remove" button when entering doses from inventory
- Not entering the data in a timely manner
- Reporting on Vaccine Administered Logs and not in the NCIR
- Server problems at the provider's office- not able to key immunizations or place an order

#### Managing Orders, Transfers, Wastage:

- Calling to place a vaccine order after going live with the NCIR instead of placing your order through the NCIR
- Manually entering inventory instead of accepting transfers prior to it being mandatory to accept transfers from the state
- Not reporting wastage
- Not reporting transfers



#### **Audience**

Inventory Control

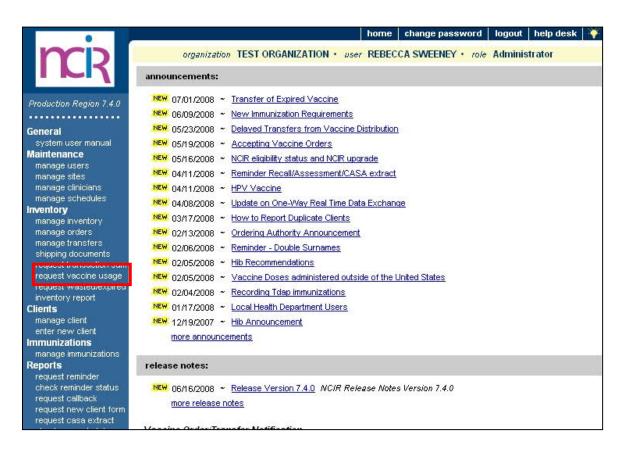
# Steps to Run a Vaccine Usage Report



## Step 1 of 3: Navigate to Vaccine Usage

A Vaccine Usage Report is going to give you a break down of the total number of vaccines used per Trade Name and Age Group.

1. Start by clicking request vaccine usage.

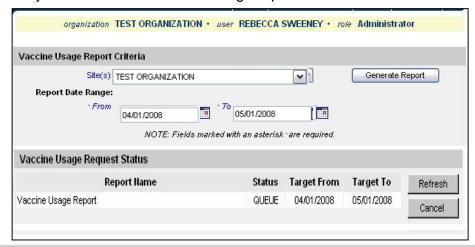






#### Step 2 of 3: Select Criteria

- 1.Choose your **Site** from the site drop down box. If you have more than one site you can choose, however, if there is only one site associated with your organization the box will default to your site.
- 2. Choose your **From** and **To** dates for when you want the report to show.
- 3. Click **Generate** when you are ready to run the report. When you click this, you will notice that a status update will appear under the report screen.
- 4. Your status will read Queue and you will need to click Refresh. This refresh button will update your status
- 5. When your report is ready to view the status will read **100%** and the report name will be displayed in blue. Just click on the report name and you can view the vaccine usage report.

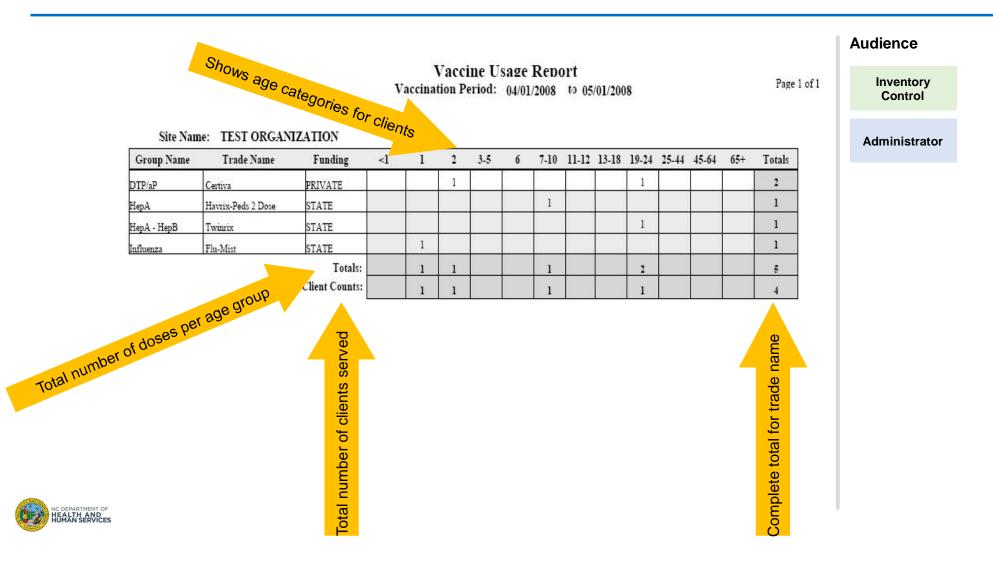








# Step 3 of 3: Generate Report



Where to Go for More Help?





#### **Contact your Regional Immunization Program Consultant (RIC)**

The RIC Coverage Map with contact information is located on the Immunization Branch website:

https://www.immunize.nc.gov/contacts.htm

#### **NC Vaccines Help Desk**

1-877-873-6247

(Monday – Friday 7:00 AM – 7:00 PM ET and Saturday 8:00 AM – 4:00 PM ET)

https://ncgov.servicenowservices.com/csm\_vaccine?id=immunizations&sys\_id=69f035b11b037c9099510f6fe54bcbee



# Appendix



# **NCIR** Roles

NCIR Role	Role Definition	Corollary Role in CVMS
Reports Only	This person in NCIR is only able to search for clients and view/print client specific records.	N/A
Typical User	Person who can manage, including add and edit, clients in NCIR, as well as manage inventory and ordering. This role also has all of the functionality of the Reports Only role.	Healthcare Provider
Inventory Control	Person who can manage inventory and ordering, as well as all of the functionality of the Typical user and Reports Only roles.	N/A
Administrator	Person who can manage organization users, sites, and clinicians in NCIR. They run practice-level reports, including reminder/recall. This role also has all of the functionality of the Reports Only, Typical User, and Inventory Control roles.	Location Manager

